

## Digital Evidence

### Creating Cases Using a Template, Updating Bundles/Sections, and Inviting Case Participants

1. **Create a Case** (to update the Placeholder Bundles/Sections for an existing case, [skip to #2](#))  
**Note:** a Local Client Admin user must have provided the user with access/rights to create cases

- a. Select **View Case List** > Select **Create a Case**

- i. **Use Template:** available templates appear in a **dropdown menu – make a selection**
- ii. **Name:** enter the **Case Number**
- iii. **Reference:** enter the **Case Title**
- iv. **Front Page:** this will be the **coversheet** for the exhibit list
  - A. Select the **Get from Template button** to pre-populate information from the template, **and add the appropriate case-specific information**, such as case number, party names, attorney names, hearing type, and the judge's name
    1. *The pre-populated information is fully modifiable, and if necessary, the template can be modified by a clerk/court user that has been provided access to the template*
    2. **QUICK TIP:** **copy the hearing type**, to paste into note/name fields when updating the case details with the hearing information and when updating Bundles/Sections
- v. Select the **Create button** to create the case

## 2. Update the Case Details with the Hearing Information

**Note:** this page opens after the case is created, and it is accessible from the *Case Home* tab

- a. Select the **Add Hearing** button to add the hearing type, date, and time

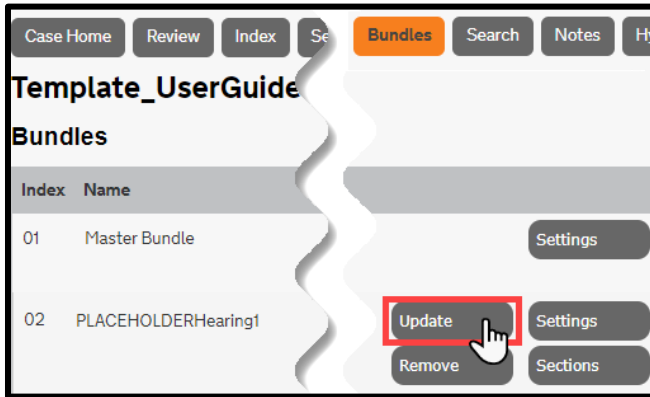
The screenshot shows the 'Case Details' page with a navigation bar at the top containing 'Case Home', 'Review', 'Index', 'Sections', 'People', and 'My S'. Below the navigation bar, the 'Case Details' section is visible. The 'Hearings' section is highlighted with a red box, and the 'Add Hearing' button is being clicked by a hand icon. Other sections like 'Parties', 'Index & Page Count', and 'Front Page' are visible.

The screenshot shows the 'Add Hearing' form. The form includes fields for 'Hearing Date' (with a calendar icon), 'Hearing Time' (with hour and minute dropdowns and AM/PM selection), 'Time Zone' (with a dropdown menu), 'Note' (with a text input field), and 'Video Conference Link' (with a text input field). A 'Back to Front Page' button is at the bottom.

- i. **Hearing Date:** select the **calendar icon** to select the hearing date
  - A. This provides the ability to filter cases within the Case List by hearing date
- ii. **Hearing Time:** select the hearing time from the **dropdown menus**
- iii. **Time Zone:** ensure that the time zone is **Arizona**
  - A. *To update the default time zone:* access **Account Details > Change Details > Select (UTC-07:00) Arizona: US Mountain Standard Time from Dropdown Menu > Select Save**
- iv. **Note:** enter the **Hearing Type**
  - A. ([quick tip in #1](#)) paste the hearing type
  - B. *For subsequent hearings, ensure that the **Front Page** information has also been updated with the **current hearing type***
- v. **Video Conference Link:** if applicable, **add the link** to access the virtual hearing
- vi. Select the **Back to Front Page** button to save the changes

**3. Update the Appropriate Bundle and Sections to Reference the Hearing - Placeholder Hearing**  
*Bundles and Sections are automatically created when the case is created using a template*

- a. Select the **Bundles tab** > Select the **Update button**

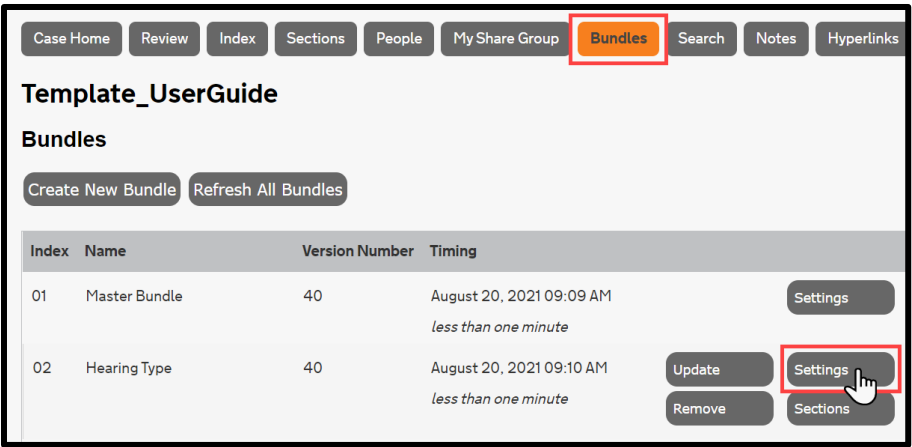


- i. Update the Name of the Bundle

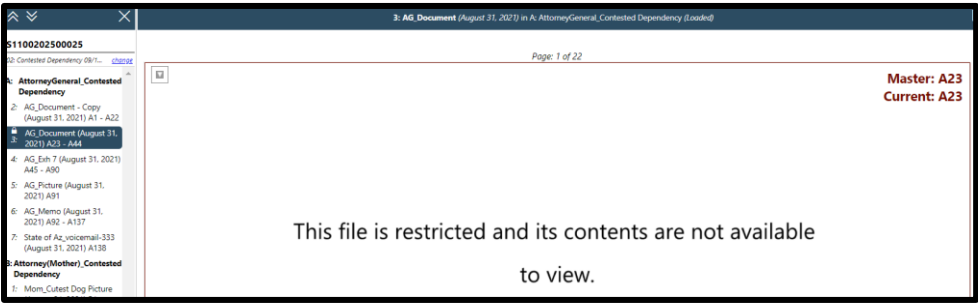
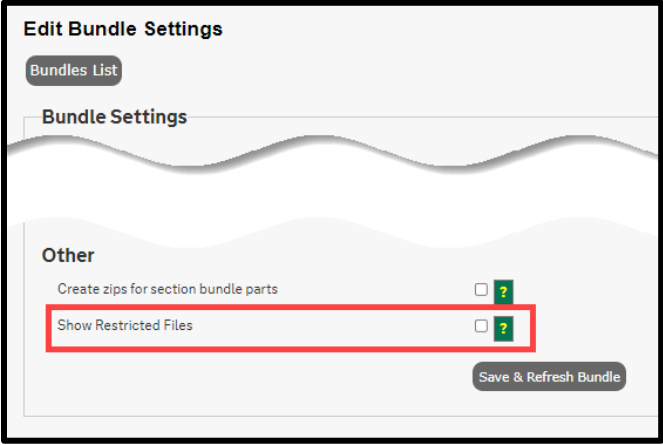
The screenshot shows a form titled 'Edit Bundle Details'. Under the 'Bundle Details' section, there are two input fields. The first is labeled 'Index\*' and contains the text '02'. The second is labeled 'Name\*' and contains the text 'PLACEHOLDERHearing1', which is highlighted in blue. Below these fields is a 'Save' button.

- A. **Name:** Enter the **Hearing Type**
1. *DoubleClick within the field to highlight the Placeholder Name*
  2. ([quick tip in #1](#)) paste the hearing type
- B. Select the **Save button** to save the changes

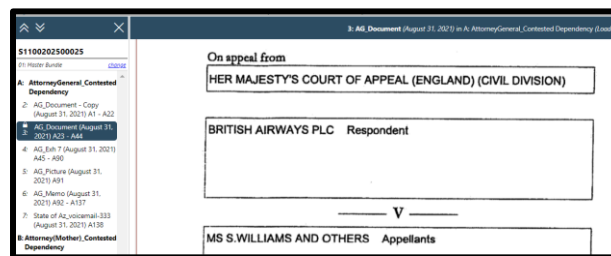
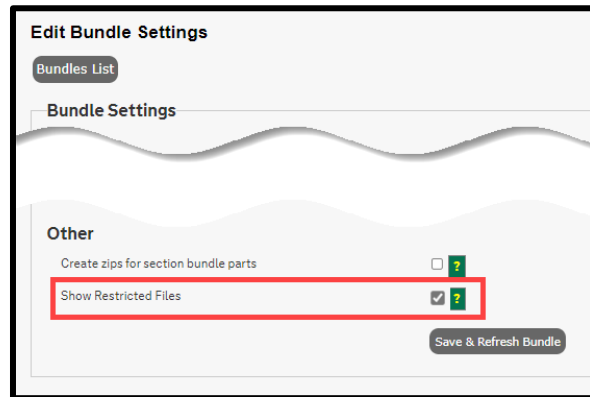
- ii. If needed, select the **Settings** button to modify the ‘Show Restricted Files’ configuration



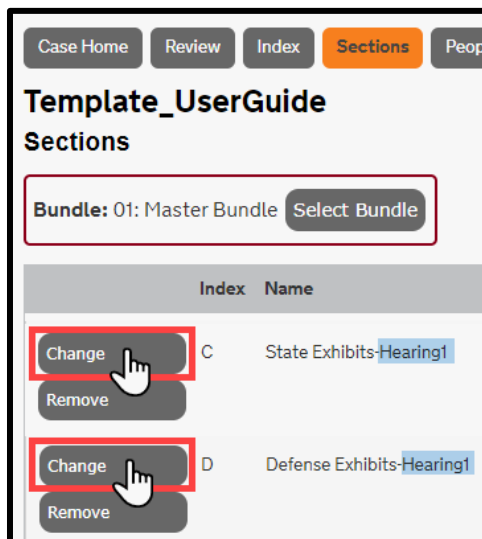
- A. The **default configuration (box unchecked)** will NOT display restricted exhibits in Review Evidence mode; **only modify this setting in accordance with local policy**



- B. If the configuration is modified to **'Show Restricted Files'** (check marked), any restricted exhibits **WILL DISPLAY** in Review Evidence mode; **only activate this setting in accordance with local policy**



- b. Select the **Section tab** to Update the Section Titles  
**Note:** the ability to update the section titles is only available when accessing the sections from the master bundle (see screenshot below)



- Ensure that the **Section Placeholder Title** being updated **matches** the **Bundle Placeholder Name** that was updated
- Select the **Change button** to modify the Section Title  
**Note:** There is one section for each side of the case, and each section must be updated

**Change Section Details**

**Section Details**

Section Number/Letter

Section Title

Section Order

Order Documents By  ?

Level  ?

- A. **Section Title:** Enter the **Hearing Type**
  1. *DoubleClick within the field to highlight the Placeholder Name*
  2. ([quick tip in #1](#)) paste the hearing type
  3. **Do NOT remove** the portion of the Title that identifies the party that will upload into a section, such as **State/Defense Exhibits** or **Plaintiff/Defendant Exhibits**
- B. Select the **Save button** to save the changes
- iii. **Repeat this step until all relevant Sections have been updated**
- c. Continue to #4 to [invite case participants](#) and/or continue to #5 to [provide existing case participants with access to the bundles/sections](#)

4. **Invite Case Participants to add the attorneys/parties to the case** – *all users included in the template will automatically be invited and have access to the case and placeholder bundles/sections when the case is created*

- a. Select the **People tab** > Select the **Invite New Participant button**

**Note:** participants must be added to the case one at a time (four screenshots below)

Case Home Review Index Sections **People** My Share Group

Template\_UserGuide

People Index

Invite New Participant Invite A List

	Title (Mr, Mrs, ..)	First Name	Last Name	Role
Update Case Access	Mrs.	Summer	Dalton	Clerk
Remove Case Access				

Case Home Review Index Sections **People** My Share Group Bundles

Template\_UserGuide

Invite A New Case Participant


Person's Email  ☒

Role

- ☐ Appellate
- ☐ Attorney
- ☐ Clerk
- ☐ Interested Party
- ☐ Judicial Administrative Staff/Court Staff
- ☐ Judicial Officer
- ☐ Juror
- ☐ Law Office Staff
- ☐ Litigant
- ☐ Public Access Request
- ☐ Self Represented Litigant
- ☐ System Support

Pre-Register ☐

- i. **Person's Email:** enter the **participant's email address**
- ii. **Role:** select the **appropriate role** for the user
  - A. *If the user has already registered a user account, then the Role will automatically be selected*
- iii. **Pre-Register:** **leave unchecked**

Expiry Date   ?

**Bundle Access**

01: Master Bundle	<input type="checkbox"/>	?
02: Hearing Type	<input type="checkbox"/>	?
03: PLACEHOLDERHearing2	<input type="checkbox"/>	?

**Access Permissions**

Change This Case	<input type="checkbox"/>	?
Add/Remove Party Documents	<input type="checkbox"/>	?
Download Documents	<input type="checkbox"/>	?
View Documents	<input type="checkbox"/>	?
Add Notes	<input type="checkbox"/>	?
Add Hyperlinks	<input type="checkbox"/>	?
Invite People	<input type="checkbox"/>	?
Update People's Access	<input type="checkbox"/>	?
Make Redactions	<input type="checkbox"/>	?
View Redaction Sub-categories	<input type="checkbox"/>	?

- iv. **Expiry Date:** to provide limited-time access, **select the calendar icon** to choose the date that the user's access to the case will expire, **or leave blank**
- v. **Bundle Access:** select the **box related to the appropriate Hearing Bundle**
  - A. **Master Bundle access should ONLY be provided to clerk/court users**
  - B. DO NOT provide access to Placeholder Hearing Bundles
- vi. **Access Permissions:** will be **automatically selected** based on the user's Role
  - A. Additional permissions may be provided, but **"Change This Case" and "Update People's Access" should ONLY be provided to CLERK/COURT users**
  - B. Auto selected permissions can be removed, if needed



**Emails**

Send bundle update notifications by Email ☐ ?

**Send Advisory Invitation Email** ☒ ?

Invitation Message

Enter Message

Invite

- vii. **Emails:** select **“Send Advisory Invitation Email”** to send a notification to user
  - A. In the **textbox**, **provide guidance on the court’s policy**
    1. Example: Please upload all of your evidence at least 2 days prior to the hearing/trial.
    2. If the text box is not visible, deselect and reselect “Send Advisory Invitation Email”
    3. If the invited user has opted-out of receiving invitation emails, the court user will see a message indicating that the user had opted not to receive advisory emails, and the court cannot override
  - B. **Do NOT select** the option “Send bundle update notifications by Email”
- viii. Select the **Invite button** to complete the invitation process
- ix. **Repeat this step** until all attorneys/parties have been invited to the case
- b. **Open Invitations will appear at the bottom** of the Participant List on the **People tab** - *an invitation is considered open when an invited user has not registered for an account*

**Open Invitations**

	Invitation Email	Expiry Date
<input type="button" value="Invite Again"/> <input type="button" value="Cancel Invitation"/>	test@gmail.com	--

- i. The **invitation may be resent or cancelled** by selecting the appropriate button

## 5. Provide an Existing Case Participant with access to Hearing Bundles/Sections

- a. All users with access to a case appear within a list under the **People tab**

**Template\_UserGuide**

**People Index**

	Title (Mr, Mrs, ..)	First Name	Last Name	Role		Bundle Access	
Update Case Access	Mrs.	Summer	Dalton	Clerk	Case Access Details	01	Master Bundle <input type="checkbox"/>
Remove Case Access						02	Hearing Type <input checked="" type="checkbox"/>
						03	Hearing Type 2 <input type="checkbox"/>
						04	PLACEHOLDERHearing3 <input type="checkbox"/>
						05	PLACEHOLDERJURY TRIAL <input type="checkbox"/>

- b. To provide/remove access to a Hearing Bundle, **locate the user and select the appropriate box to add/remove a checkmark** - a **checked box** indicates that the user has been granted access and an **unchecked box** indicates that the user does not have access
- When access is being provided, users will automatically have access to the Sections within the Bundle
  - Changes will be automatically saved** when a box is checked or unchecked
- c. **Repeat this step** until all case participants have been given access to the appropriate Hearing Bundle